



Filing ID #10023312

FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • 135 Cannon Building • Washington, DC 20515

FILER INFORMATION

Name: Julie Lynn Oliver
Status: Congressional Candidate
State/District: TX25

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2018
Filing Date: 05/15/2018

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|---|-------|--------------------|----------------|-------------------------------|-----------------------|
| Alphabet Inc. - Class A (GOOGL) [ST] | | \$1,001 - \$15,000 | None | | |
| Alphabet Inc. - Class A (GOOGL) [ST] | | \$1,001 - \$15,000 | None | | |
| Alphabet Inc. - Class A (GOOGL) [ST] | SP | \$1,001 - \$15,000 | None | | |
| Alphabet Inc. - Class A (GOOGL) [ST] | SP | \$1,001 - \$15,000 | Tax-Deferred | | |
| Alphabet Inc. - Class C Capital Stock (GOOG) [ST] | SP | \$1,001 - \$15,000 | Tax-Deferred | | |
| Alphabet Inc. - Class C Capital Stock (GOOG) [ST] | DC | \$1,001 - \$15,000 | None | | |
| Alphabet Inc. - Class C Capital Stock (GOOG) [ST] | | \$1,001 - \$15,000 | None | | |
| Amazon.com, Inc. (AMZN) [ST] | SP | \$1,001 - \$15,000 | Tax-Deferred | | |
| American Tower Corporation (AMT) [ST] | DC | \$1,001 - \$15,000 | Dividends | \$201 - \$1,000 | \$201 - \$1,000 |

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|--|--------------|-----------------------|-----------------------|--------------------------------------|------------------------------|
| Apple Inc. (AAPL) [ST] | DC | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | \$1 - \$200 |
| Apple Inc. (AAPL) [ST] | SP | \$15,001 - \$50,000 | Tax-Deferred | | |
| AT&T Inc. (T) [ST] | SP | \$1,001 - \$15,000 | Tax-Deferred | | |
| Ernst & Young 401(k) ⇒ AF EUROPAC GROWTH R6 (RERGX)09/19/2014 [MF] | | \$1 - \$1,000 | Tax-Deferred | | |
| Ernst & Young 401(k) ⇒ AF NEW PERSPECT R6 (RNPGX)09/19/2014 [MF] | | \$1 - \$1,000 | Tax-Deferred | | |
| Ernst & Young 401(k) ⇒ FID 500 INDEX IPR (FXAIX)06/27/2013 [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | |
| Ernst & Young 401(k) ⇒ Fid Blue Chip GR K (FBGKX) 12/12/2008 [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | |
| Ernst & Young 401(k) ⇒ FID DIVSFD INTL POOL 03/31/2017 [MF] | | \$1 - \$1,000 | Tax-Deferred | | |
| Ernst & Young 401(k) ⇒ Fid Low PR Stk Pool 03/31/2017 [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | |
| Ernst & Young 401(k) ⇒ FID REAL EST IDX INS (FSRNX)11/15/2017 [MF] | | \$1 - \$1,000 | Tax-Deferred | | |
| Ernst & Young 401(k) ⇒ TRP NEW HORIZONS I (PRJIX)12/03/2015 [MF] | | \$1 - \$1,000 | Tax-Deferred | | |
| Ernst & Young 401(k) ⇒ VANG CAP OPPS ADM (VHCAX)09/19/2014 [MF] | | \$1 - \$1,000 | Tax-Deferred | | |
| Ernst & Young 401(k) ⇒ VANG PRIMECAP CORE (VPCCX)09/19/2014 [MF] | | \$1 - \$1,000 | Tax-Deferred | | |
| Ernst & Young 401(k) ⇒ | | \$1 - \$1,000 | Tax-Deferred | | |

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|--|--------------|-------------------------|------------------------|--------------------------------------|------------------------------|
| VANG SM VAL IDX INST (VSIX)09/19/2014 [MF] | | | | | |
| Ernst & Young 401(k) ⇒ VANGUARD TARGET 2035 09/19/2014 [MF] | | \$1 - \$1,000 | Tax-Deferred | | |
| Ernst & Young 401(k) ⇒ VANGUARD TARGET 2050 09/19/2014 [MF] | | \$1 - \$1,000 | Tax-Deferred | | |
| Ernst & Young 401(k) ⇒ VANGUARD TARGET 2060 09/19/2014 [MF] | | \$1 - \$1,000 | Tax-Deferred | | |
| FIDELITY CAPITAL & INCOME [MF] | SP | \$1 - \$1,000 | Tax-Deferred | | |
| FIDELITY FOCUSED STOCK FUND [MF] | DC | \$1,001 - \$15,000 | Dividends, Interest | \$201 - \$1,000 | \$1 - \$200 |
| FIDELITY GOVERNMENT CASH RESERVES [MF] | SP | \$1 - \$1,000 | None | | |
| FIDELITY NEW MARKETS INCOME [MF] | SP | \$1,001 - \$15,000 | Tax-Deferred | | |
| FIDELITY SELECT GOLD [MF] | SP | \$1 - \$1,000 | Tax-Deferred | | |
| FIDELITY SELECT TECHNOLOGY [MF] | SP | \$1,001 - \$15,000 | Tax-Deferred | | |
| HCA 401(k) ⇒ 25-To-Go Fund [MF] | | \$15,001 - \$50,000 | Tax-Deferred | | |
| HCA 401(k) ⇒ 35-To-Go Fund [MF] | | \$50,001 - \$100,000 | Tax-Deferred | | |
| HCA 401(k) ⇒ Commodities Index Fund [MF] | | \$15,001 - \$50,000 | Tax-Deferred | | |
| HCA 401(k) ⇒ Emerging Market Stock Index Fund [MF] | | \$15,001 - \$50,000 | Tax-Deferred | | |
| HCA 401(k) ⇒ High Yield Corporate Bond Fund [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | |
| HCA 401(k) ⇒ Large Company Growth Index Fund [MF] | | \$15,001 - \$50,000 | Tax-Deferred | | |

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
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| HCA 401(k) ⇒ Large Company Value Index Fund [MF] | | \$15,001 - \$50,000 | Tax-Deferred | | |
| HCA 401(k) ⇒ Real Estate Investment Trust Index Fund [MF] | | \$15,001 - \$50,000 | Tax-Deferred | | |
| HCA 401(k) ⇒ Small Company Growth Index Fund [MF] | | \$15,001 - \$50,000 | Tax-Deferred | | |
| HCA 401(k) ⇒ Small Company Value Index Fund [MF] | | \$15,001 - \$50,000 | Tax-Deferred | | |
| Intuitive Surgical, Inc. (ISRG) [ST] | DC | \$1,001 - \$15,000 | None | | |
| NH Portfolio 2027 ⇒ NH PORTFOLIO 2027 (FIDELITY FUNDS) [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | |
| Novavax, Inc. (NVAX) [ST] | DC | \$1 - \$1,000 | None | | |
| Novavax, Inc. (NVAX) [ST] | SP | \$1 - \$1,000 | Tax-Deferred | | |
| Rental, Austin, TX [RP] | | \$250,001 - \$500,000 | Rent | \$15,001 - \$50,000 | \$5,001 - \$15,000 |
| LOCATION: Austin / Travis, TX, US | | | | | |
| Rollover IRA ⇒ FIDELITY CAPITAL & INCOME [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | |
| Rollover IRA ⇒ FIDELITY CONTRAFUND [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | |
| Rollover IRA ⇒ FIDELITY EXPORT & MULTINATIONAL [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | |
| Rollover IRA ⇒ FIDELITY GOVERNMENT CASH RESERVES [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | |
| Rollover IRA ⇒ FIDELITY LEVERAGED COMPANY STOCK [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | |

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|---|--------------|-----------------------|-----------------------|--------------------------------------|------------------------------|
| Rollover IRA ⇒ FIDELITY NEW MARKETS INCOME [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | |
| Rollover IRA ⇒ FIDELITY SELECT CHEMICALS [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | |
| Rollover IRA ⇒ FIDELITY SELECT DEFENSE & AEROSPACE [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | |
| Rollover IRA ⇒ FIDELITY SELECT ENERGY [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | |
| Rollover IRA ⇒ FIDELITY SELECT HEALTH CARE SRVC [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | |
| Rollover IRA ⇒ FIDELITY SELECT NATURAL GAS [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | |
| SPDR Select Sector Fund - Technology (XLK) [ST] | DC | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | \$1 - \$200 |
| TrovaGene, Inc. (TROV) [ST] | DC | \$1 - \$1,000 | None | | |
| TWEEDY BROWNE GLOBAL VALUE FUND [MF] | SP | \$1,001 - \$15,000 | Tax-Deferred | | |

* Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

SCHEDULE C: EARNED INCOME

| Source | Type | Amount Current Year to Filing | Amount Preceding Year |
|------------------------|---------------|--------------------------------------|------------------------------|
| HCA | Salary | \$328,615.00 | \$273,456.00 |
| Apple | Spouse salary | N/A | N/A |
| New Payroll Associates | Spouse salary | N/A | N/A |
| Breatherock Group | salary | \$9,700.00 | \$17,730.00 |

SCHEDULE D: LIABILITIES

| Owner | Creditor | Date Incurred | Type | Amount of Liability |
|--------------|--------------------------|----------------------|--------------------------------|----------------------------|
| JT | PNC | July 2013 | Mortgage on home, Austin, TX | \$250,001 - \$500,000 |
| JT | PNC | June 2016 | Mortgage on rental, Austin, TX | \$250,001 - \$500,000 |
| | San Antonio Credit Union | September 2014 | Car loan | \$15,001 - \$50,000 |
| | Chase | Jan 2011 | Credit card | \$10,000 - \$15,000 |

SCHEDULE E: POSITIONS

| Position | Name of Organization |
|-----------------|--------------------------------|
| Board Member | Central Health (uncompensated) |

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

- Ernst & Young 401(k)
- HCA 401(k)
- NH Portfolio 2027
LOCATION: NH
- Rollover IRA

EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

Trusts: Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?

Yes No

Exemption: Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption?

Yes No

CERTIFICATION AND SIGNATURE

I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the best of my knowledge and belief.

Digitally Signed: Julie Lynn Oliver , 05/15/2018